

The 2003 Annual Briefing for Administrative Professionals

FUTURE SKILLS—WHAT YOU NEED TO SUCCEED IN 2003 AND BEYOND



Featuring Bob Nelson





321 Bayview Street
Yarmouth, ME 04096

Dear Participant:

Welcome to the 2003 Annual Briefing for Administrative Professionals, presented by the Federal Training Network (FTN) in association with the American Management Association (AMA) and the International Association of Administrative Professionals (IAAP).

The program has been designed with you, the administrative professional, in mind, on the basis of research conducted by IAAP.

Today's program describes techniques for optimizing workplace relationships. In two highly interactive hours, you will learn how to take initiative at work, and how to develop the future skills needed to be more productive in the workplace.

FTN delivers hundreds of programs annually, by satellite and the Internet—both live and prerecorded. The FTN Channel provides cutting-edge training on management and professional development in areas such as leadership, change, team building, risk management, and business skills.

We offer live events with the most highly regarded speakers and thought-leaders of today, including Rudy Giuliani; Jack Welch; Ken Blanchard; Erin Brockovich; Steve Lundin, author of *FISH! Sticks*; Oren Harari, author of *The Leadership Secrets of Colin Powell*; John Gray, author of *Mars and Venus in the Workplace*; and many more.

To learn more about who we are and the many learning opportunities available by satellite and to the desktop, visit us on the web at www.fedlearn.com or give us a call at 800.243.9799.

We hope you enjoy and learn from this year's AMA Annual Administrative Professionals Briefing.

Sincerely,

Hal Hunter
Executive Director
Federal Training Network



1601 Broadway
New York, NY 10019-7240

Dear Administrative Professional:

You are a valuable asset to your organization! A recent survey of administrative professionals conducted by the American Management Association indicated that administrative professionals today have assumed more responsibility, are doing more work than before, and are taking more of a leadership role.

These rapidly changing and often turbulent times create both opportunities and challenges: opportunities in developing and using new skills, exploring new roles and making an impact in your organization...and challenges that include managing very heavy workloads and keeping pace with developments in the business world.

The American Management Association is dedicated to serving you with a wide variety of training and networking opportunities. As your partner in management development, our goal is to provide you with the most valuable and relevant learning opportunities and to support you in every aspect of your career. We understand that your career path may lead you in a variety of directions, from ever-increasing seniority and responsibility within your current position to exploration of management or entrepreneurial opportunities.

AMA is here to meet your needs—when you need it, and in user-friendly forms, from our seminars, books, self-study materials, and CD-ROMs to our Web-based Admin Resource Center (ARC). In addition, we also bring the leaders of your profession together at our Annual Conference for Administrative Professionals. Our 11th Annual Conference will be held September 22–24, 2003, at the Walt Disney World's Dolphin Hotel in Orlando, Florida.

To learn more about AMA's resources for administrative professionals, please visit our Web site at www.amanet.org or call 1-800-262-9699 to receive information.

We salute you during Administrative Professionals' Week—and, more importantly, recognize and support you all year round! Best wishes for continued success in 2003.

Sincerely,

A handwritten signature in black ink that reads "Mico Zinty". The signature is written in a cursive, slightly stylized font.

Mico Zinty
Practice Consultant, Administrative Professional Seminars
Director, Innovation Award
American Management Association

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INTRODUCTION

Purpose of Workshop

To provide administrative office staff with strategies, tools, and techniques for taking initiative, partnering with their bosses, influencing others, and being proactive in their jobs.

What You Will Learn

By participating in this satellite presentation, you will learn how to

- ❑ Identify ways to take initiative and be proactive at work.
- ❑ Express confidence and share ideas at work.
- ❑ Demonstrate assertive statements.
- ❑ Recognize your own leadership capabilities.
- ❑ Acknowledge the power of persuasion.
- ❑ Develop a better working relationship with your boss.

AMA CEU Credits

You can receive immediate recognition for your career development efforts. A CEU certificate suitable for framing can be sent to you upon satisfactory completion of the 2003 Annual Briefing for Administrative Professionals. By providing your Site Coordinator with your name and Social Security number, AMA will send you a certificate and keep a record of your CEUs completed.

The International Association for Continuing Education and Training (IACET) has accepted AMA as an Authorized Sponsor to issue CEUs.

This course is worth 0.2 CEU.

SITE COORDINATORS

Site Coordinators, please use the form “List of Candidates to Receive Continuing Education Units” to record participants’ names and Social Security numbers for proper administration of CEU credits. The form is included in your package of materials. Return the form to:

Martha Leon
American Management Association
Resources
1601 Broadway, 6th Floor
New York, New York 10019

CERTIFICATES OF COMPLETION

Certificates of Completion are available from the Federal Training Network. Please see your Site Coordinator or visit www.fedlearn.com to download your certificate.

Program Schedule

WELCOME—Tracey Matisak

TRENDS IN ADMINISTRATIVE SUPPORT—Ollie Jo Bozeman CPS/CAP

TAKING THE INITIATIVE—Bob Nelson, Ph.D.

QUESTIONS AND ANSWERS

BREAK

PARTNERING WITH YOUR BOSS—Carmen A. Rivera

INFLUENCING OTHERS—Kate Driesen

QUESTIONS AND ANSWERS

SUMMARY

How to Get the Most from this Presentation

BEFORE THE PRESENTATION

Read the biographies of our presenters at the end of these participant materials, and become familiar with their accomplishments.

DURING THE PRESENTATION

Participate! Contribute to the discussion.

If you are participating in the live presentation of this program, call in, fax, or e-mail your question to Ollie Jo, Bob, Carmen, or Kate.

If you are taking part in an encore presentation of this program, share your questions with the Site Coordinator and your colleagues.

Take notes! As the presenters speak, think of ways you behave that you can change, starting now. Jot down these ideas and strategies for applying today's information back on the job and in your life. Use the blank lines in the presentations for notes.

Follow along and complete the activities.

Complete and return the evaluation form given to you by your Site Coordinator. Be sure to complete the reverse side if you are seeking CEUs for participating in this program.

AFTER THE PRESENTATION

Apply what you've learned! Reread this handout and your notes.

Complete any activities you started during the presentation.

Do the postpresentation activity that begins on page 27.

PRESENTATION

Fast Facts about Administrative Professionals

Presenter: Ollie Jo Bozeman CPS/CAP

The secretarial/administrative support profession is one of the largest segments of the workforce...

- ❑ Today, there are more than 3.9 million secretaries and administrative assistants working in the United States, according to U.S. Department of Labor statistics (2001). A total of 8.9 million people work in various administrative support roles, including office clerks, customer service representatives, receptionists, and other office staff.
- ❑ In Canada, there are 500,000 administrative professionals, which includes 402,600 secretaries, 11,900 executive assistants, and 94,000 clerical supervisors (Statistics Canada).
- ❑ Millions more administrative professionals work in business and government offices across the globe.

TRENDS IN ADMINISTRATIVE SUPPORT

The past two decades have been called the “Information Age”—dominated by desktop and laptop computers, e-mail, and the Internet. Business software and computer networks have transformed the secretarial profession. Here are some notable trends in the administrative support profession, based on IAAP research:

- ❑ *Admins are expanding into more technical and managerial roles.* For example, the switch to Microsoft Office and other popular office suite software packages allows for more integrated functions, leading to new career paths in areas such as finance and accounting, desktop publishing, research, project management, and more.
- ❑ *Admins are handling a wider variety of duties beyond strictly clerical roles.* Today’s admins often purchase office equipment and supplies, plan meetings and special events, work closely with vendors and suppliers, create presentations and give them as well, interview, orient, and supervise other staff, write and edit documents, schedule events and facilities, coordinate direct mailings, maintain multiple schedules and calendars, handle messages and correspondence (with voicemail, e-mail, and regular postal mail), maintain computer files, directories, and databases, and more.
- ❑ *Internet use has increased.* The Internet is used increasingly for travel information, meeting planning, research, and forming connections with other individuals and organizations. It’s like having a well-stocked library and global communications tool at your fingertips.
- ❑ *Admins are also increasingly taking on roles as troubleshooters.* They often troubleshoot software problems within the office and adapt software

for applications particular to their companies. Since admins are often the first worker-group to test and master new office technology, they are well positioned to maintain their status as “Information Managers of the Information Age.”

- ❑ *Teamwork in the office has increased.* Administrative professionals are increasingly becoming key contributors to work teams. The lines continue to blur between management and administrative functions,
- ❑ *More and more admins are assuming new tasks.* These new tasks include Web site design and maintenance, electronic scheduling, project management, desktop publishing, and negotiating with clients and vendors.

EMPLOYER INVESTMENT IN TRAINING FOR ADMINISTRATIVE SUPPORT STAFF

Wise employers are investing in the professional development and training of administrative support staff. As administrative professionals expand their responsibilities, new avenues are opening up for admins to build skills and increase their value to the organization. Administrative professionals are being called upon to use not only computer and technology skills, but also interpersonal communications, project management, negotiation, and more.

In a 2002 survey, IAAP members cited the need for management and technical training as the most significant issue facing their profession. More than 71 percent of those surveyed noted the need for management training, and 86 percent named technical training. Specific subjects in which respondents most often said they needed training included computer-specific software, technology applications, supervisory skills, project planning, and communication and organizational skills.

Professional development represents a win-win situation for business and the administrative professional. By providing opportunities to enhance individual skills, employers will reap the benefits of increased productivity. Admins gain the reward of greater job satisfaction and more fully realizing their personal potential.

Ways in which employers can facilitate professional development for administrative professionals include supporting the following:

- ❑ Seminars and continuing education programs
- ❑ In-house training classes
- ❑ Online training programs
- ❑ Tuition reimbursement to attend college classes and work toward a degree
- ❑ Membership and participation in professional organizations

- ❑ Studying for and attaining professional certifications through IAAP's Certified Administrative Professional (CAP) and Certified Professional Secretary (CPS) programs.

TIPS ON STAYING AHEAD IN A CHANGING WORKPLACE

The office workplace is rapidly changing. Administrative professionals are given greater responsibilities. What can administrative staff do to adapt to these changes and maximize their value to employers? IAAP offers these tips:

- ❑ *Become a computer software expert.* Demonstrate your mastery of “office suite” software packages, which typically include word processing, spreadsheet, database, presentations, and scheduling software. Become skilled in using the Internet to gather information to further your organization's goals and to serve customers' needs. Learn how to update and maintain your organization's Web site.
- ❑ *Actively pursue continuing education.* Attend business-related workshops and seminars or pursue a college degree program. Polish your written and verbal communications skills. Volunteer for workplace assignments or community service activities that will stretch you and provide new business networks.
- ❑ *Learn how to plan conferences and meetings.* Facilitate well-organized and user-friendly meetings through good site selection, logistics, and audiovisuals. Understand when to use audio- and video-conferencing in lieu of on-site meetings. Become adept at creating presentations using computer software.
- ❑ *Be a good teacher and leader.* Many administrative professionals train and supervise other staff. Becoming active in a local IAAP chapter offers many opportunities to practice organizational leadership roles, such as chapter officer, board member, or committee leader.
- ❑ *Become a communications hub for your workplace.* Clients and vendors often judge the image of a business by the quality and efficiency of its first-line administrative support staff. Customer service skills are critically important. Interpersonal skills (tact, diplomacy, negotiation) are also essential.
- ❑ *Be an adept organizer and information manager.* Use computerized data as well as paper records to provide information needed by managers. Understand the relationships among data to create value-added service when storing or retrieving information. Today's administrative staff increasingly conduct research and help manage projects from conception to completion.
- ❑ *Get involved in selecting and maintaining office equipment.* Stay abreast of the latest types of available office equipment and what is most suited to increasing your organization's productivity. Seek appropriate vendors and team with them to get the most from equipment features. Learn to oversee equipment purchases, evaluate office supply needs, and schedule maintenance.

The 2003 Annual Briefing for
Administrative Professionals

presents

Taking Initiative:
The Power Within You

with

Dr. Bob Nelson
President
Nelson Motivation Inc.

Taking the Initiative

Presenter: Bob Nelson, Ph.D.

Taking initiative is

- ❑ Doing what needs to be done without waiting to be told what or how to do it.
- ❑ Realizing that you should never need permission to do good work.

BENEFITS OF INITIATIVE

- ❑ Makes your job more exciting and less stressful
- ❑ Allows you to be more proactive and productive
- ❑ Helps you realize and leverage your leadership potential
- ❑ Helps create a more positive and motivating work place

Activity

Think of a time in your job when you were proactive and took initiative and were successful.

Describe that instance below:

4 P'S OF TAKING INITIATIVE

- ❑ Positive attitude and accountability
- ❑ Preparation for taking initiative
- ❑ Presentation of needs and ideas
- ❑ Persistence and follow-through

Positive Attitude and Accountability

Strategies for being positive and proactive

- ☐ Be positive; start each day positive: say it's going to be a good day.
- ☐ Prioritize your time and be organized.
- ☐ Go with the flow, but keep focused.
- ☐ Take initiative: Don't let anyone hold you up.
- ☐ Be flexible and willing and able to laugh.
- ☐ Don't take things personally!
- ☐ Don't bring the job home and don't bring home to work.
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

Preparation for Taking Initiative

Assessing Your Points of Power

Position Power is _____

Knowledge Power is _____

Task Power is _____

Relationship Power is _____

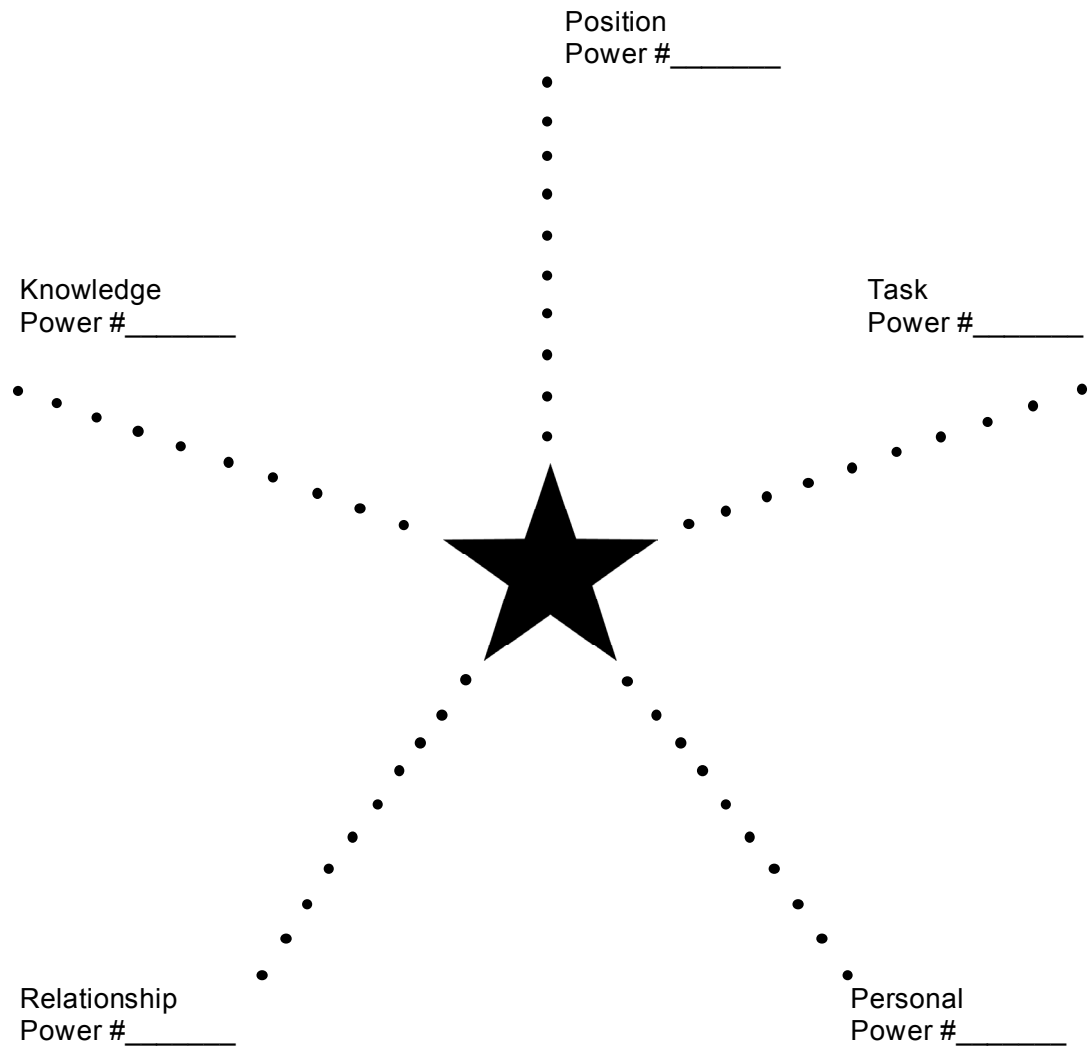
Personal Power is _____

Activity

List a workplace situation where you feel you have the power to influence others:

Evaluate your points of power using the graphic on the next page.

Points of Power



Connect appropriate dots in this order:

- Position Power to Relationship Power
- Relationship Power to Task Power
- Task Power to Knowledge Power
- Knowledge Power to Personal Power
- Personal Power to Position Power

Presentation of Needs and Ideas

Guidelines for Being Assertive

1. Focus on what you need to have done:
“I need for you to...”
“I would like for you to...”
“It’s important for you to...”
2. Avoid any blame or judgment of the person you’re speaking to. Don’t raise your voice or become sarcastic or condescending.
3. Where possible, provide choices of options for the person:
“You can get this signed now or you can bring it back later.”
“You can fax or e-mail me the information I need.”
“You can be on time or call me if you will be late.”
4. Broken record technique: Repeat your request again and again—don’t let the other person sidetrack the conversation!
5. Know your own “hot” buttons and avoid having them pushed.
Remember, you can’t control other people’s thoughts, feelings, or reactions, but you can always control your own behavior!

(For additional help on being more assertive, read *When I Say No, I Feel Guilty*, by Manuel J. Smith, Bantam, 1975.)

Activity

Think of a work situation in which you need to be assertive and practice “I need” statements using the above guidelines:

Persistence and Follow-Through

Overcoming Challenges and Obstacles

- ❑ Limited time to do your job
- ❑ Limited resources and staff
- ❑ Lots of interruptions and distractions

- ☐ Influencing others without formal authority
- ☐ Personality conflicts
- ☐ Personal issues at work
- ☐ Others not doing their jobs
- ☐ Very little positive appreciation
- ☐ General overload and stress
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

DEALING WITH NAYSAYINGS AND NAYSAYERS

Often when someone has a new idea, others criticize it. What do they say? Brainstorm the typical putdowns, criticisms and negativity you have heard to a new idea when it was presented in your organization. (Examples: "It can't be done," "It's not in the budget," and "We tried it two years ago and it didn't work.") Have fun with this, but try to include actual forms of resistance you have encountered in your organization.

1. _____

2. _____

3. _____

Now go back to each item and indicate a possible way to overcome the objection.

1. _____

2. _____

3. _____

50 EXCUSES WHY IT WILL NOT WORK

1. We tried that before.
2. Our place is different.
3. It costs too much.
4. That's not my job.
5. It's too radical a change.
6. We're too busy to do that.
7. We don't have enough time.
8. There's not enough help.
9. The staff will never buy it.
10. It's against our policy.
11. The union will scream.
12. It runs up our overhead.
13. We don't have authority.
14. Let's get back to reality.
15. That's not our problem.
16. I don't like the idea.
17. You're right, but....
18. You're ahead of your time.
19. We're not ready for that.
20. It isn't in the budget.
21. Can't teach an old dog new tricks.
22. Good thought, but impractical.
23. Let's give it more thought.
24. We'll be the laughing stock.
25. Not that again.
26. Where'd you dig that one up?.
26. Where'd you dig that one up?.
27. We did all right without it.
28. It's never been tried before.
29. Let's shelve it for the time being.
30. Let's form a committee.
31. I don't see the connection.
32. It won't work in our district.
33. The executive committee will never go for it.
34. Let's all sleep on it.
35. It can't be done.
36. It's too much trouble to change.
37. It won't pay for itself.
38. I know a person who tried it.
39. That's impossible.
40. We've always done it this way.
41. Top management won't buy it.
42. We'd lose money in the long run.
43. Don't rock the boat.
44. That's what we can expect from the staff.
45. Has anyone else ever tried it?.
46. Let's look into it further.
47. Quit dreaming.
48. The customer will never go for it.
49. That's too ivory tower.
50. It's too much work.

SUMMARY AND CLOSING

Thoughts to Take Away

- ❑ Be as independent as possible in your job today.
- ❑ Know how to do it and, if you aren't sure, develop strategies, options or resources for finding out.
- ❑ Do it! Use the tools and techniques we've discussed.
- ❑ Remember, it's usually easier to ask for forgiveness than it is to ask for permission!
- ❑ Learn from your mistakes so you don't repeat them.
- ❑ Be a positive role model that others can follow.

*If you always do what you've always done,
you'll always get what you've always got!*

Other Notes and Program Learnings

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and extend across the width of the page. There are no margins, text, or other markings on the paper.

Partnering with Your Boss

Presenter: Carmen A. Rivera

HOW TO MAKE IT HAPPEN

Having your manager as a partner is not only desirable but essential if you want a good, productive working relationship. Creating this kind of relationship requires that you treat each other with respect and understanding. Here are some things you can do to make this happen.

- ☐ Achieve a common understanding of goals.

- ☐ Probe for information and clarification.

- ☐ Give and receive feedback.

- ❑ Listen actively.

- ❑ Describe how you like to be treated.

HOW I LIKE TO BE TREATED*

To prepare for your conversation with your manager on how you wish to be treated, take a moment to read the following statements and check off any that are true for you. Feel free to add more of your own.

1. _____ I want to be told when I make a mistake so I don't make it again.
2. _____ I want my boss to tell me directly if she/he disagrees with me.
3. _____ I like being told when I'm doing well so I know I'm on the right track.
4. _____ I want my boss to ask for my input and to listen to my concerns.
5. _____ I want the freedom to do things my own way.
6. _____ I want my boss to roll up her/his sleeves and help out when we're busy.
7. _____ I don't want to have to ask for directions and approval every step of the way.
8. _____ I like it when others tell me what's on their minds.
9. _____ I like being treated as an equal.
10. _____ I like it when people call me by my first name.
11. _____ I like to be seen as an individual, not just considered one of the group.
12. _____ It feels good when I am noticed and singled out for praise.
13. _____ I like people to look at me in the eye when they talk to me.
14. _____ I like making "small talk" before getting down to business.
15. _____ I like _____.
16. _____ It feels good when _____.

*Adapted from Lee Gardenswartz and Anita Rowe, *Managing Diversity: A Complete Desk Reference and Planning Guide* (NY: Irwin, 1993).

Influencing Others without Authority

Presenter: Kate Driesen

Each of us has been a powerful influencer at times in our lives:

- ❑ Every time you interviewed for a job and got the job, you influenced the interviewee. You persuaded them that you were the best person for the job.
- ❑ When you convinced a friend or loved one to go skiing instead of to a beach vacation, you have used influencing and persuasion skills.
- ❑ When you ask a co-worker to do you a favor and they do it, you have used influencing and persuasion skills.

Were you conscious of the skills and behaviors you used? Can you become influential with people on an aware level? Can you present an idea, a proposal, or a change in procedure and be confident that your idea will be met with success?

The three essential factors that impact our ability to influence are credibility, flexibility, and likeability.

CREDIBILITY

The five components of credibility:

- ❑ *Trustworthiness*—Do you do what you say you are going to do? If I do not trust you, there is very little you can do to influence me.
- ❑ *Competence*—If I do not see you as competent, it will be hard to convince me to do anything.
- ❑ *Intention*—Is it a win-win situation or do you just want to manipulate me?
- ❑ *Personality and dynamism*—Are you committed to and energized around your proposal?
- ❑ Credibility opens the door to influence and without credibility the door is slammed shut.

Notes

FLEXIBILITY

Flexibility means that you approach each individual understanding that he/she has a different style and different needs. It is important to remember that each person likes his/her own style of working and communicating. *We must be flexible enough to treat people the way they want to be treated, not the way we want to be treated.*

We like best those people who are like us. It requires less work, less adapting, if someone's style of communicating and working is close to ours.

The essential part of flexibility is respecting different points of view, different cultures, and different experiences of the world. Think of differences in people not as barriers but as opportunities to learn and grow yourself.

Notes

[illegible]

LIKEABILITY

People like people who listen to them, who make them feel important and significant, and who have empathy. Listening is not waiting to talk.

Listening is experiencing someone's world, clarifying for understanding, hearing below the words, and staying present. It is not fixing people, solving problems, or sharing your experiences around the topic. Listening is a gift of your time and your presence. And it is hard work.

Likeable people are empathetic. Empathy is seeing the world through someone else's lens, from his/her perception. How does that world look?

Likeable people laugh at themselves, have a positive attitude and forgive imperfections.

Notes

[illegible]

SUMMARY

Influencing can be a win–win for both sides if you remember to be *credible*, *flexible*, and *likable* and remember “mutual benefit exchange” or what’s in it for them.

Remember it is not what your scorn, criticize or hate that gives you flexibility, credibility, and likeability. Rather it is what you love, value, and appreciate that gives you’re the personal power to influences others.

POSTPRESENTATION ACTIVITY

Homework for “Taking the Initiative”

Presenter: Bob Nelson

PROBLEM DESCRIPTION

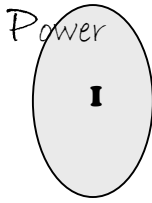
Consider a current problem that could be resolved or an opportunity that could be taken advantage of in your job if you took initiative on it, for example, a critical problem, communication or process improvement, or cost-saving idea. Briefly describe the problem or opportunity below:

ACTION PLANNING

- ☐ Isolate the Problem/Opportunity
- ☐ List Possible Solutions
- ☐ Evaluate Each Option
- ☐ Prioritize Next Steps

Use the following worksheet pages to create an action plan for dealing with the problem or opportunity that you described.

WORKSHEET: Isolate the Problem/Opportunity



PINPOINTING SPECIFICS

Use the following questions to think about and more fully pinpoint a particular problem area or opportunity where you can take initiative. As you read each question, visualize your workplace and the way things are currently done there.

- ☐ How long has the situation existed? Is it getting worse or better?

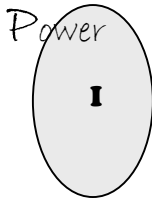
- ☐ Who all is affected by the existing situation? Do they want to change things?

- ☐ What costs are incurred by the problem? What opportunities are lost?

- ☐ What will be the consequence if the situation is not changed?

- ☐ On a scale of 1–10 (1 = highest), how urgent is the situation?

WORKSHEET:
List Possible Solutions

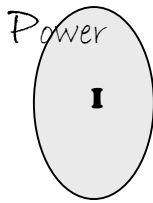


IDEA GENERATION

When it is your turn in your group, briefly explain the nature of the problem or improvement you are addressing and the starting point you have identified. If you have already decided on a course of action, the group will provide feedback and ideas about it, such as ways to improve it, to streamline it, to sell it, etc. If you have not yet identified a course of action, the group will do a four-minute brainstorm of suggestions for you. Use the space below to take notes on their ideas. Honor each idea by writing it down.

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and extend across the width of the page. There are no margins, text, or other markings on the paper.

WORKSHEET: Evaluate Options



FORCE FIELD ANALYSIS

A force field analysis is a process for weighing the factors that are helping or hindering the action you wish to implement.

In the blanks at the left, list the Helping Forces, that is, those factors that will make your efforts easier. Consider: your own initiative and resources, job know-how, a supportive boss, peers willing to help, alignment with an organizational initiative, a friend outside the organization to discuss the situation with you, etc.

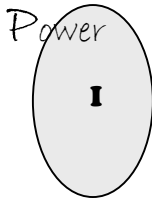
In the blanks at the right, list the Hindering Forces, that is, those factors that will make your efforts harder. Consider: length of time the situation has existed, limited resources (money, staff, time), negative attitudes of others, existing organization policies, difficulty of change, etc.

For each factor, draw an arrow the length of which indicates the strength of the factor (longer arrow = stronger factor). What could be done to strengthen the Helping Forces and weaken or eliminate the Hindering Forces?

Helping Forces   Hindering Forces

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

WORKSHEET: Prioritize Next Steps



GOAL SETTING

In the space below, write your goal. What do you want to be different based on the action you take? What specifically will be improved, how, and by when?

My goal is to:

In the spaces below, write down the first action steps you will take to reach your goal. Each step shows exactly what you will do (conduct a trial run, secure permission, get so-and so's support, write up a proposal, etc.).

ACTION STEP 1:

will be completed by: _____

ACTION STEP 2:

will be completed by: _____

ACTION STEP 3:

will be completed by: _____

ADDENDA

Books for Additional Reading

TAKING INITIATIVE

To find out more about taking initiative, read the following books by Bob Nelson (available at most bookstores, at Amazon.com, or directly from Dr. Nelson at www.nelson-motivation.com):

- ❑ *1001 Ways to Take Initiative*
- ❑ *Please Don't Just Do What I Tell You: Do What Needs to Be Done!*
- ❑ *1001 Ways to Energize Employees*
- ❑ *1001 Ways to Reward Employees*
- ❑ *Managing for Dummies*
- ❑ *The 1001 Rewards & Recognition Fieldbook*

INFLUENCING OTHERS WITHOUT AUTHORITY

- ❑ *Influence without Authority*, by David Bradford and Allan Cohen
- ❑ *Influence*, by Robert Cialdini
- ❑ *Influencing within Organizations*, by Andrezej Huczynski
- ❑ *Say What You Mean, Get What You Want*, by G.R. Walthers
- ❑ *Basic Influencing Skills*, by A.Ivey, N. Gluckstern, and M. Ivey

PARTNERING WITH YOUR BOSS

- ❑ *Getting Things Done When You are Not in Charge*, by Geoffrey M. Bellman
- ❑ *Smart Women Smart Moves*, by Vanessa J. Weaver, PhD. and Jan C. Hill
- ❑ *Frames of Reference*, by Carol Rudman, PhD.
- ❑ *Chances & Choices: How Women Can Succeed in Today's Knowledge-Based Business*, by Janet C. Wylie.
- ❑ *Why Didn't I Say That?* by Donald H. Weiss

American Management Association offers a world of continuous learning opportunities throughout your career. AMA is dedicated to keeping your career on the upswing with a wide range of services and products...Acquire the latest skills and information related to your job while you earn professional recognition and stay connected to your professional community. Here is what AMA has to offer you (see our website at www.amanet.org for complete details):

SEMINARS

Through a wide range of seminars, administrative professionals have access to a full curriculum that will enable them to:

- ❑ Meet today's changing business challenges.
- ❑ Get results.
- ❑ Take on new responsibilities and an increase workload.
- ❑ Assume leadership, managerial, and supervisory responsibilities.
- ❑ Improve their business writing skills.
- ❑ Build better working relationships.
- ❑ Communicate for greater productivity.
- ❑ Project a confident, professional image.
- ❑ Become proactive partners with their bosses.
- ❑ Learn the fundamentals of finance and accounting
- ❑ Manage projects and improve processes.

See our Web site, www.amanet.org, for dates and locations for the following:

- ❑ Stepping Up to Leadership: a Course for Administrative Professionals, Meeting No. 2119.
- ❑ Management Skills for Administrative Professionals, Meeting No. 2294.
- ❑ Partnering With Your Boss: Strategic Skills for Administrative Professionals, Meeting No. 2268.
- ❑ The Essential Administrative Professional: The Skills and Know-How to Make You Invaluable, Meeting No. 2299
- ❑ Communicating with Diplomacy, Discretion, and Influence: A Course for Senior Administrative Professionals, Meeting No. 2196.
- ❑ Project Management for Administrative Professionals, Meeting No. 2298.
- ❑ Fundamentals of Finance and Accounting for Administrative Professionals, Meeting No. 2518.

- ❑ Successful Meeting and Event Planning, Meeting No. 2198.
- ❑ Greater Productivity Through Improved Work Processes: A Guide for Administrative Professionals, Meeting No. 2156.
- ❑ Managing Chaos: Dynamic Time Management, Recall, Reading and Stress Management for Administrative Professionals, Meeting No. 2194.
- ❑ Business Writing for Administrative Professionals, Meeting No. 2296.

ANNUAL CONFERENCE

“Make Your Own Magic”—that’s the theme of AMA’s 11th Annual Administrative Professionals Conference at Walt Disney World’s Dolphin Hotel in Orlando, Florida, September 22–24, 2003. The conference promises comprehensive, career-boosting learning tracks, powerful, inspiring keynotes and more than 30 information-packed sessions presented by dynamic, expert trainers. Sign up now to obtain our early-bird special!

THE ADMINISTRATIVE EXCELLENCE CERTIFICATE

The AMA Administrative Excellence Certificate Program provides you with the formal recognition you have earned and deserve! To qualify, complete three seminars—or two seminars and one attendance at AMA’s Administrative Professional Conference, within 24 months and you will earn a Certificate in Administrative Excellence.

THE ADMIN RESOURCE CENTER (ARC) ON THE WEB

Discover the latest insights from the leading experts in business and management—and your admin colleagues. ARC is designed to provide you with news, tips, perspectives, and other valuable information. *Ask the Experts* gives you the opportunity to send in your greatest questions and challenges for concrete practical advice. *News* keeps you in contact with AMA’s latest services and products—and special offers available to admin pros. *Your Success Stories* reveal how your colleagues have used training and other educational methods to propel their careers forward.... And more!

AMA’S ADMINISTRATIVE PROFESSIONALS E-NEWSLETTER

More than 1000 administrative professionals have signed up for *The Take-Charge Assistant*. Why not join them? It’s free and chock-full of useful information on career development, business trends, and tips to help you

succeed professionally and personally. To receive your copy, just send your name and e-mail address to ARC@amanet.org.

THE INNOVATION AWARD FOR ADMINISTRATIVE PROFESSIONALS

AMA believes that many of the contributions of administrative professionals to office productivity and corporate performance go unnoticed. Consequently AMA has created the annual AMA Innovation Award to identify and celebrate outstanding examples of creative problem solving and innovation in office support.

Now it's your turn to show the world how good you are by applying for the Innovation Award! To be eligible for the Innovation Award, you must have formulated a fresh solution to a problem or an innovation that has had tangible results for your organization, from increased efficiency or productivity to dollar savings, to employee or customer satisfaction.

Winners will be honored at an award ceremony during the 11th Annual Administrative Professional's Conference, September 22–24, 2003, at Walt Disney World's Dolphin Hotel in Orlando. The winner will be AMA's guest throughout the conference—with registration fees, and hotel and travel expenses, covered.

The application deadline is Friday, June 27th, 2003. Please refer to AMA's Web site—www.amanet.org—for eligibility requirements, application forms, and deadlines!

AMA MEMBERSHIP

AMA's membership gives you the opportunity to access the latest and best in management thinking and practices through Mworld, AMA's member-only Web site. Among the many benefits, members get special discounts in addition to preferred pricing on seminars and receive *Executive Matters*, a new monthly e-newsletter that addresses today's business challenges.

AMACOM BOOKS

These books will help you grow in your career:

- ❑ *Make Your Contacts Count, Networking Know-How for Cash, Clients, and Career Success*, by Anne Baber and Lynne Waymon. Order #08144-7093-9. \$14.95.
- ❑ *Managing Workplace Chaos, Solutions for Handling Information, Paper, Time and Stress* by Patricia Hutchings. Order #08144-7127-7. \$15.00.
- ❑ *Managing Multiple Bosses: How to Juggle Priorities, Personalities & Projects—and Make It Look Easy*, by Pat Nickerson. Order #7025-4, \$15.95.

- ❑ *The Girls' Guide to Power and Success*, by Susan Solovic, Order #081440589. \$22.95.
- ❑ *Our Money, Ourselves: Redesigning Your Relationship With Money*, by Dr. C. Diane Ealy and Dr. Kay Lesh. Order #7999-5. \$17.95.
- ❑ *The Office Romance: Playing With Fire Without Getting Burned*, by Dennis M. Powers. Order #0464-2. \$22.95.
- ❑ *Power Etiquette: What You Don't Know Can Kill Your Career*, by Dana May Casperson. Order #7998-7. \$14.95.
- ❑ *Building A Partnership With Your Boss*, by Jerry Wisinski. Order #7013-0. \$12.95.
- ❑ *Planning Successful Meetings and Events*, by Ann Boehme. Order #7995-2. \$12.95.
- ❑ *Business Writing Skills*, by Joseph Dobrian. Order #7973-1. \$12.95.
- ❑ *Empower Yourself!* by Dr. Marlene Caroselli. Order #7951-0. \$12.95.
- ❑ *Will The Real Boss Please Stand Up! Taking Your Administrative Career to the Next Level*, by George-Anne Fey. Order #0422-7. \$19.95.
- ❑ *From Secretary Track to Fast Track*, by Ken Lizotte and Barbara A. Litwak. Order #7902. \$15.95.
- ❑ *Administrative Assistant's and Secretary's Handbook*, by J. Stroman and K. Wilson. Edited by Susan Heyboer O'Keefe. Order # 0273-9. \$22.95.
- ❑ *The Secretary's Secret Weapon: Arm Yourself for Success With Seven Essential Communication Skills*, by Bobbi Linkemer. Order #7895-6. \$17.95.
- ❑ *The AMA Handbook of Business Letters*, Second Edition, by Jeffrey L. Seglin. Order #0331-X. \$69.95.
- ❑ *Cyber Assistant: How to Use the Internet to Get More Done in Less Time*, by D.A. Smith-Hemphill, Ph.D. Order #07011. \$19.95.
- ❑ *How to Resolve Conflicts at Work, A Take-Charge Assistant Book*, by Florence Stone. Order #07989. \$17.95.

SELF-STUDY MATERIALS

- ❑ Career Essentials for Secretaries and Administrative Assistants (83072 CGVM)
- ❑ Communication Skills for Secretaries and Administrative Assistants (80242 CGVM)
- ❑ Skills for Success: A Guide for Secretaries and Administrative Assistants (95085 CGVM)

International Association of Administrative Professionals



The International Association of Administrative Professionals is the world's largest association for administrative support staff, with more than 600 chapters and 40,000 members and affiliates worldwide. For more than 60 years, IAAP has provided up-to-date research on office trends, cutting-edge publications, outstanding seminars and conferences, and topnotch resources to help administrative professionals enhance their skills and become more effective contributors to their employers.

Information...Education...Networking...
it's all available through IAAP!

IAAP's Web site provides the latest information from the association. From here you can e-mail Headquarters staff with questions, or find a chapter near you—across the country or around the world. Get information about the Professional Education Conference, the Certification Seminar, and the Education Forum.

The Professional Education Conference is held each spring and is 2½ days of intensive education.

The Certification Seminar (for CPS® and CAP^{CM} holders and approved candidates) is held each year at a resort area. The seminar is 2½ days of training by outstanding presenters.

The International Convention and Education Forum. is held each summer in July or early August. The convention is 4 days of educational workshops, business sessions, and videos, with fun activities included. In addition, at the Office Expo you can see the latest in technology from vendors.

OfficePRO® magazine contains cutting-edge information on trends in office administration, new technology, and career development.

Visit IAAP's Web site at www.iaap.org.

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Top Ten Ways to Take Initiative

By Bob Nelson, Ph.D.

In today's fast-moving, constantly changing business environment, the need for employees to take initiative and do what needs to be done without waiting to be told is greater than ever. In addition to helping your organization save money, improve processes, or delight customers, taking initiative makes your job more exciting, as you are able to make things happen and get a reputation for doing so. Here, then, are the top 10 ways you can take initiative and make a difference at work.

1. Think how things could be improved. It's the person who does a job that knows best how it can be done better. Ask silly questions, such as "Why do we do it this way?" A secretary at Johnsonville foods asked why the company didn't sell directly to customers and was soon put in charge of what became a multi-million-dollar direct-sales division.

2. Think like a customer. Look at the business from your customers' perspective, asking what would make it easier to do business with your company. An employee at Kacey's Fine Furniture in Denver suggested changing the store's operating hours to times that were more convenient for working customers, and sales instantly rose 15 percent.

3. Track your own performance. Track activity in your own job to build a case for improvements that could be made. An assembler for United Electric Controls tracked his numbers and was able to devise a simpler way to inventory parts that saved the company much money.

4. Take action on your ideas. Having ideas is good, but don't just plop them on the table and expect others to run with them. Be an advocate for your ideas. An employee at Starbucks pushed a frosty new coffee drink she believed in and, with time, the Frappuccino became a \$100 million product for the company.

5. Do your homework. Think through your ideas—what steps need to be taken, and the costs and benefits—and collect supporting data. A part-time employee of the State of Massachusetts independently researched the state's Medicaid rules on her own time and was able to uncover an accounting glitch that enabled the state to obtain higher reimbursements. She received a cash award and special thanks from the governor.

6. Build consensus. Start with those who will most likely be interested in your idea and get them involved in supporting it. In the early days of the Internet, an IBM employee sent an internal memo out to employees urging them to "get connected," along with action items they could take. He immediately got support for his initiative from others around the vision he saw for the future. He later was named Chief Technology Officer.

7. Speak up at meetings. We've all been in meetings that have gotten sidetracked or bogged down. Be the person who speaks up to say, "It may just be me, but have we been over this ground before? Perhaps we should summarize the choices and take a group vote for how we want to proceed."

Others in the group will appreciate your intervention and you will help move the group closer to its goals.

8. Volunteer for new assignments. Whether it is a pressing problem, a special task force, or someone else in the department that needs help, be the person to step forward to help out. A new employee at The Gap in Toronto noticed the company's policy manual didn't cover half the issues that came up in the store and drafted a concise training manual that is now used through the country.

9. Manage your manager. Try to understand your manager's priorities and fit your ideas into those. Tell your manager what you need in order to do the best job for him or her. An employee at CP Corporation in San Jose told her manager that she wanted to meet once a month to review her work and get feedback about her progress. These short meetings kept her manager informed of her needs and successes—and reenergized her.

10. Stick with your ideas; persevere. It's very infrequently that ideas are met with open arms. Stay the course with those ideas you most believe in that will help the business. When management nixed an employee's idea for a flextime work schedule, she simply waited until a new manager came on board to propose the idea again, which was then accepted.

About the Presenters

OLLIE JO BOZEMAN



Ollie Jo Bozeman CPS/CAP of Austin, Texas is the 2002/2003 president of The International Association of Administrative Professionals (IAAP). IAAP is the world's largest association for administrative support staff, providing education and training, certification programs, and networking opportunities for more than 40,000 members and affiliates worldwide.

Bozeman is employed at the Texas Hospital Association. She attended Austin Community College and Southwest Texas State University, earned the Certified Professional Secretary rating in 1988, Certified Public Notary designation in 1989, and Certified Administrative Professional rating in 2001.

BOB NELSON



Dr. Nelson is a best-selling author (2.5 million books sold) with more than 20 years of instructional design and delivery experience in professional and management skills. Dr. Nelson's blockbuster book, *1001 Ways to Reward Employees* (nearly 2 million copies sold worldwide), is one of the only books to be consistently listed on *Business Week's* bestseller list since the list's inception more than seven years ago. His follow-on books, *1001 Ways to Energize Employees*, *1001 Ways to Take Initiative at Work*, *Managing For Dummies*, and *Please Don't Just Do What I Tell You, Do What Needs To Be Done* further his powerful message.

Dr. Nelson has been featured extensively on television (CNN, MSNBC, and PBS), radio (National Public Radio, USA Radio Network, and Business News Network), and in print (*The New York Times*, *The Wall Street Journal*, *The Washington Post*, *The Chicago Tribune*, and in numerous magazines). He serves as an online expert for *Time* magazine and America Online.

Dr. Nelson writes a weekly column for American City Business Journals, a monthly column for *Corporate Meetings and Incentives* magazine, and a quarterly column for *SAM's Club Source* magazine (circulation of 5 million business owners). He is publisher of *Bob Nelson's Rewarding Employees*, cited as one of the country's best management newsletters.

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CARMEN A. RIVERA



Carmen A. Rivera is a human relations specialist, a trained conflict-resolution mediator, and a certified professional coach. She has been facilitating adult learning since 1969. She designs, develops, and delivers training workshops that stress critical interpersonal skills, such as emotional intelligence, valuing workforce diversity, communication, sexual harassment prevention, leadership, team building, conflict resolution, change and transition, and effective management. Thousands of participants have attended her workshops from all over the United States and the world, including CEOs, executives, managers, supervisors, and technical and support staff from national organizations, federal government agencies, and nonprofit organizations. She has also provided professional and personal coaching to managers and executives.

Ms. Rivera has experience in administering various leadership and behavior measurement instruments and is certified on the Myers-Briggs Type Indicator. She is also experienced in training trainers on effective presentation skills. She is a seminar leader for the American Management Association and developed for them a seminar on workplace diversity and managerial skills.

Ms. Rivera founded and is president of NewInSights, Inc., and is a graduate of the Newfield Network coaching program, Coaching for Professional and Personal Mastery.

KATE DRIESEN



Kate Driesen is the President of Driesen Communication, which has conducted communication, leadership, and presentation skills training for thousands of business executives and other professionals since 1990. These seminars are tailored to the needs of clients such as AT&T, AMAI, Bristol Myers, Merck, Hughes, Motorola, Westinghouse, Los Angeles Deputy Sheriffs Department, Forest Lab, March of Dimes, Zebra Communication, Anderson Consulting, Johnson & Johnson, Wrigley Gum (Great Britain), Home Depot, Department of Justice (Australia), Wyeth (Canada), *Business Week*, UST, Newell RubberMaid, Elsevier Publishing, and the U.S. Armed Forces.

Kate is a certified Self-Esteem Trainer and Gender Speak Trainer, MBTI Qualified, a Situational Leadership Instructor, and a consultant trainer with the American Management Association where she teaches Accelerated Learning to Trainers, as well as other topics.

Kate was the Training and Marketing Director for Jack Canfield, the author of the *Chicken Soup for the Soul* books. She also is the female voice in the audio recording of the original *Chicken Soup for the Soul* book.

Ms. Driesen has received recognition and awards for her work with inner-city school children (Speaker in the Classroom), Hughes K-12 Program, Annenberg Grant foundation, Women in Business, and the Stella Adler Academy.

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	Excellent	Good	Fair	Poor	
1. Rating that best reflects my overall evaluation to this videoconference:	_____	_____	_____	_____	
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	Strongly agree	Agree	No opinion	Disagree	Strongly disagree
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